Arizona Department of Economic Security

Arizona Early Intervention Program (AzEIP)

I-TEAMS User Manual

Version 1.0

Table of Contents

1.   Introduction:

I-TEAMS (*Infant-Toddler Electronic Administration and Monitoring System*) is a web-based application which allows DES/AzEIP as well as its contractors and partner agencies, including the Arizona State Schools for the Deaf and the Blind *(ASDB)*, the DES/Division of Developmental Disabilities *(DDD)*, Raising Special Kids *(RSK)*, and Northern Arizona University/Institute for Human Development *(AzEIP TAMS)* to record and view information in an easy and efficient manner.

1.1. Information Recorded and Accessed in I-TEAMS

  a.   Organization and Contract related information

1.   Add personnel to I-TEAMS
2.   Assign personnel to contract regions and to roles; remove or change personnel as needed
3.   Record Professional Provider's information in Professional Registry
4.   Create and submit invoices to DES/AzEIP based on services provided under contracts (Billing)
5.   Create/Manage Banner messages   for their Team members and Personnel

  b.   Child related information:
1.   Enter/View Referral Information for a child
2.   Record/View Child Demographics information
3.   Record/View Insurance Information for a child
4.   Enter/View Eligibility decision and reason
5.   Create and update IFSPs for a child
6.   Enter/View Contractor for a child
7.   Enter/View Service Coordinator for a child
8.   Assign and Change Team members for a child
9.   Enter/View Service Delivery information
10. Enter/View Transfer, Transition and Exit information for a child
11. Enter/View Child Entry/Exit Indicator Summary information

1.2. User Roles and Access to I-TEAMS

Access to I-TEAMS is determined by the roles assigned to the employee, including contractors and their subcontractors. Roles may be assigned by the DES/AzEIP Contract Admin, Contract Admin, DDD Admin and ASDB Admin. There are three levels of access:

  a.   Read access- able to view, but not enter or edit, information
  b.   Write Access- able to enter and edit information
  c.   Read and Write Access- able to read, enter and edit

2. Service Delivery:

Using the Service Delivery page, the user can enter all services that were provided to the child. The Service Delivery page can be accessed through the "Child Demographics" page in a record.

- o *Note: Service deliveries have to be entered in I-TEAMS. Each person who has a write access to Service Delivery can enter service delivery information for a child that is assigned to them.*

Additional Data

Referral
Insurance Information *(opens in a new window)*
Assign / Change Team Members
Eligibility
IFSP Information *(opens in a new window)*
Child Entry Indicator Summary Form
Service Delivery
Transfer Child
Transition Child
Child Exit Indicator Summary Form
Exit Child Record

Add Comments: *Add Notes*

Actors Access Table:

Actor #	Actor Name	Access
1	Referral	**--**
2	Service Coordinator	**Write**
3	DDD Service Coordinator	--
4	ASDB Service Coordinator	--
5	Professional Provider	**Write**
6	DES AzEIP App Admin	**Write**
7	Contract Admin	**Write**
8	Supervisor	**Write**
9	DDD Admin	R-if DDD
10	ASDB Admin	R-if ASDB
11	Finance	**Write**

12	Data Entry Expanded	**Write**
13	Monitor & TA Contactor	Read
14	DDD Finance	R-if DDD
15	ASDB Finance	R-if ASDB

2.1.   Screen Display of Service Delivery:

2.2.   Team Member:

Select team member name that has provided the services using drop down list. This field has provider name along with discipline type. This information is only available if the team member has been added to the Assign/Change Team member page.

2.3.   Date:

System defaults and displays the current date which can be changed using calendar icon or text box.

2.4.   Service:

Select the service that was provided by the team member selected using drop down list.

2.5.   Modifier(s):

User may select multiple modifiers using check boxes that apply to their services delivery.

Modifier(s)
- [ ] Assessment
- [ ] Assistive Technology
- [ ] Data
- [ ] Evaluation
- [ ] Meeting
- [ ] Multiple eligible children 2
- [ ] Multiple eligible children 3
- [ ] Non-Direct
- [ ] Record Review
- [ ] Report Writing
- [ ] Service Coordination (Dual role)
- [ ] Sign Language and Cued Language
- [ ] Team Lead

2.6. Units:

Service Delivery units have to be entered in this dropdown. For example, if a service provider delivered service for 2 hours and 15 minutes, they would select 2 in the first drop down and .25 in the next one.

- o *Note: 15 minutes = .25 units for service delivery. No more than 8 units can be recorded for a day for service delivery.*
- o *Note: Units drop down list will be populated based on the modifiers and services.*
- o *Note: Service Coordinator non-direct units are billed for every 0.25 units the service coordinator actually worked.*
- o *Note: Here are few rules that might be helpful when selecting the modifier:*
  - o Cannot select multiple eligible children 2 and multiple eligible children 3 together.
  - o Cannot select any other modifier with Report writing, Report Review or Evaluation.
  - o Data can be selected alone or can be selected with Service Coordination (Dual Role).

2.7. Location (Zip):

Enter the zip code using text box where the service was provided.

- o *Note: In case of an Address Confidentiality Program (ACP) child, this field will be a drop down, and one of the ACP Zip codes will have to be selected for Service Delivery.*

2.8. Setting:

Using drop down list select the setting that apply.

2.9. Is TPL Reimbursable:

If the service *is* TPL reimbursable, user has to select, "Yes". If not, then "No" should be selected.

2.10. Reversal:

If user had entered wrong service, select "Yes" for reversal; otherwise it defaults to "No". A reversal of service will be shown as negative and will appear in red font in the service delivery information section as shown below. This reversal will show as a negative on the invoice, and this is where the user will see an invoice reversal amount on the next invoice generated.

2.11. Service Delivery Notes:

User may enter notes about the particular service that was entered using text box.

2.12. Save:

User must select "Save" button if the user wants to save this service delivery information.

2.13. All & Current IFSP Only:

Once Service Delivery information has been saved, it will move down to the service delivery grid *(below the Service Delivery Notes)*, where all service deliveries can be seen. The user has the option to list the service deliveries by either seeing all IFSP's or only the current IFSP's. The option to select this is at the top of the Service Delivery grid.

2.14. Edit

The user may edit the service information by selecting edit link next to the particular service delivery. It will automatically populate at the top where Service delivery information was entered earlier, and user can edit and save as desired. The user will not be allowed to delete a service.

2.15. Date:

It displays the date when the service was delivered.

2.16. Provider:

In the provider section it displays three fields.

- **i** **Physical Therapist**: This is the Job Title that was given to the employee when entering him/her to I-TEAMS.
- **ii** **Physical Therapist** *(in second row)***:** This field will display the discipline of the Professional Provider.
- **iii** **Peter Griffin** *(Dummy Name)***:** This field will display the name of professional provider.

2.17. Service:

This column will display the service that was provided.

2.18. Service Modifiers:

If any of the service modifiers are selected while entering Service Delivery information, they will be displayed here. *(E.g., Assessment.)*

2.19. Units:

The number of "Units" of service that was provided will be displayed in this field.

2.20. Remaining:

Next column where it says, *"Non IFSP"*, basically states whether or not the service is an authorized IFSP service. If it is, it should show the *'Remaining Units'* authorized in the field. Otherwise, it will show *"Non IFSP"*.

2.21. Location:

This field displays the zip code where the service was delivered.

2.22. Setting:

The setting the service was provided will be displayed here. *E.g., Home, Community Based, or Other.*

2.23. TPL Reimbursable:

If the user selected, *"Yes"* while entering Service Delivery information, it will show a *"Yes"* here; otherwise, it will show a *"No"*.

2.24. Pending:

If the service has been entered and the user has created a draft invoice for it, it will show the services as *"Pending"*.

2.25. Invoiced:

If the service has been invoiced, the user can no longer edit the service delivery *(as shown in the image)*. When the service is approved the service status would be changed to Invoiced.

3. Service Delivery – Team Conferencing:

3.1.   Screen Display of Service Delivery:

3.2.   Enter Team Conferencing:

Select the Enter Team Conferencing Link. This link will navigate the user to the Team conferencing page where the user can enter the Team Conferencing Units.

3.3. Date

System defaults and displays the current date which can be changed using calendar icon or text box.

3.4. Team Members

Select the Team members who attended the Team Conferencing. All the Team Members selected on the Assign/Change Team Members page will be displayed on the Team Conferencing page as well. Please make sure that all the Team Members involved in the Team Conferencing are added on the Assign/Change Team Members page as well.

3.5. Service:

Do NOT select any service. Leave the service as blank.

3.6. Units:

Team Conferencing units needs to be entered a Units Drop Down. A user can select a maximum of 0.75 units per quarter.

3.7. Settings:

Settings will default to "Other"

3.8. Location (Zip):

Enter the location zip code where the team conferencing took place.

3.9. Service Deliver Notes:

User can enter any notes about team conferencing event in the text box.

3.10. Save and Cancel

Clicking on Cancel would cancel the data entered on the Team Conferencing page.

Clicking on Save would save the team conferencing data for the users on the service delivery page grid.

3.11. Back to Service Delivery

Clicking on this button will navigate the user to the Service Delivery page for that child. Please make sure to save the data before navigating to the Service Delivery page. All unsaved changes will be lost if user clicks on this button without saving any data on the Team Conferencing page.

Department of Economic Security

Subject: User Guide (Invoice and Service Delivery)

	Date	Provider	Service	Service Modifier(s)						
Edit	6/10/2013	Speech Therapist Speech-Language Pathologist **John Morgan**	------	Team conferencing		Units: **0.25**	**Not IFSP**	Location: **85012**	Setting: **Other**	TPL Reimbursable: **No**
Edit	6/10/2013	Physical Therapist Physical Therapist **Isaac Newton**	------	Team conferencing		Units: **0.25**	**Not IFSP**	Location: **85012**	Setting: **Other**	TPL Reimbursable: **No**
Edit	6/10/2013	Occupational Therapist Occupational Therapist **Suzie Smith**	------	Team conferencing		Units: **0.25**	**Not IFSP**	Location: **85012**	Setting: **Other**	TPL Reimbursable: **No**
Edit	6/10/2013	Supervisor Service Coordinator **Joey Smith**	------	Team conferencing		Units: **0.25**	**Not IFSP**	Location: **85012**	Setting: **Other**	TPL Reimbursable: **No**

4.   Create Invoice:

Users will have the option to build a draft invoice, save the draft invoice, and prepare a final invoice. All of the invoices will be created by each contracted region based on their service delivery. The users will navigate to the Invoice screen by clicking on the *"Create Invoice"* from the left-hand menu.

- o ***Note:*** *A user can make only one draft for a particular time period.*

Actors Access Table:

Actor #	Actor Name	Access
1	Referral	--
2	Service Coordinator	--
3	DDD Service Coordinator	--
4	ASDB Service Coordinator	--
5	Professional Provider	--
6	DES AzEIP App Admin	**Write**
7	Contract Admin	**Write**
8	Supervisor	**Write**
9	DDD Admin	--
10	ASDB Admin	--
11	Finance	**Write**
12	Data Entry Expanded	**Write**
13	Monitor & TA Contactor	--

4.1. Screen Display of Prepare Invoice Page:

Home Page > Billing > Create Invoice

Invoice

Invoice Summary

Back To Home Page

Prepare Invoice   Review Draft

A. Prepare Invoice:

Using the *"Prepare Invoice"* button, a user can search for all services within a specific time frame, remove or add services, and prepare an invoice and save it as a draft.

4.2. Date:

The date is a non-editable field and will default to the current date.

4.3. Contract:

This is a drop-down field. The contact values will be populated in the drop-down based on the service delivery selected. A contract field is **required**. Once the user selects the contract, the *"Get Services"* will appear.

4.4. Service Start Date:

A user can enter service start date using text box or calendar icon.
  o *Note: Invoices must be submitted in separate months. Cannot combine multiple months in an invoice.*

4.5. Service End Date:

A user can enter service end date using text box or calendar icon.

4.6. Get Services:

Select Get services button to get the list of all the services within that time frame.

  o *Note: Once this button is selected, it changes to 'View Non-Billable'. User can select all the services that are not billable. If there is no non-billable service under the contract, the grid will be empty. To make these services billable the user will need to go to the service delivery page for that service and change it to a service that is billable*

4.7. Remove:

Clicking on *"Remove"* will just remove the service(s) from the invoice. And these removed service will not be included in the draft invoice will be displayed on the Prepare Invoice screen only and will be editable by the user from the service delivery page.

  o *Note:* It will change the link to *"Add"*. The user can simply add that service back to invoice. Once the *"Remove"* link is selected, the service will show *"Edit"* link so the user can make any changes needed.

4.8. Save draft:

Clicking in the *"Save Draft "link* will save the all services under one invoice and will remove these services from the *"Prepare Invoice"* tab and move them under the *"Review Draft"* tab.

  o *Note: If a draft is saved for the time period, and user tries to add another draft invoice. System will prompt that there is already a draft saved and that would have to be deleted before another draft can be saved.*

4.9. Steps to Prepare an Invoice:
  • Click on *Prepare Invoice*
  • Date is defaulted to the current date
  • Select *Contract* from the drop down *
  • Select *Service Start date*
  • Select *Service End date*
  • Click on the *Get Service* button

- Remove the services that the user does NOT want to be submitted as a part of invoice. *(This would be an optional step)*
- Click on *Save Draft*

B. Review Draft:

Using review draft button, a user can retrieve all draft versions of invoices, discard or submit as a final invoice.

4.10.   Screen display of Review Draft Page:

4.11. Select Contract:

It is a drop down field and is a required field. The contact values will be populated in the drop down based on the service delivery selected. Once the user selects the *Contract "Retrieve Draft"*, the button appears.

4.12. Invoice Number:

It is a drop down field. Select one invoice number based on the number of invoices.

4.13. Submit:

Select submit button to send invoice as final invoice for approval.

4.14. Discard:

If user selects discard button it removes the invoice from the grid table and changes the status of this invoice from *"Pending"* to *"Edit"*. The invoice appears back on the Prepare Invoice screen and the service is editable again on the Service Delivery page.

4.15. Steps to Review Draft and Submit Invoice:

- Click on the **Review Draft.**
- Select **Contract** from the drop down.*
- Select **Invoice Number**.
- Click on **Retrieve Draft** button.
- Click the **Submit** button to submit the invoice OR Click the **Discard** button to remove the draft invoice if needed. *(This would be an optional step)*

  o **Note:** *If the invoice* is denied by the AzEIP Finance admin it would appear back under the "Prepare Invoice" screen. The user can make the edits as requested by the AzEIP Finance admin, on the service delivery page and then re-submit the invoice again for approval.